

Instructions (delete once plan is complete): This template is your guide in creating a **lean business plan**. The headings in each section should remain as-is, while the text below informs your team what to write under each heading. Replace that text with your company's information taken from your previously created mission statement and business model canvas. When every section has been updated, you have created a lean business plan.

Company Name

Year



Executive Summary

President's responsibility.

This is a summary of the entire business plan.

Must include: brief product description, who is on your team and what roles do they have (refer to Appendix A), fixed costs, variable costs, breakeven point (in dollars), sales goal (in dollars and units), final share value if you meet your sales goal, return on investment (ROI).



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Value Proposition

To be completed by the President

Use Mission Statement previously created and Value Proposition section of Business Canvas.

1.1 Company Mission

“[Your mission statement]”

Is the mission statement for?

[Your company name], a JA Canada Company

1.2 General Information

Legal Name: *Company name*, a JA Canada Company

Business Address: School OR Room, Street Address

Type of Business: Corporation

Incorporation Date: When did you apply for incorporation?

1.3 Business Profile

Type of Business

Company name is a private corporation. Common Shares were issued to gain the starting capital.

Major Goods

What product do you intend to sell? Give a brief description, which includes the unique qualities of your product (colors, sizes, etc.) 1 paragraph, 2-3 lines.

2.1 Marketing Plan

To be completed by the VP Marketing

Use Marketing Channels and Customer Relationships section of Business Canvas

2.2 Goals and Objectives

What are your goals/objectives when it comes to marketing your product (Ex. Sales goal, trade shows, incentives, etc.)? List up to 5 SMART goals. Each goal must have up to 3 specific actions you will take to ensure the goal is met.

2.3 Marketing Strategy

Target Market

Who will buy your product (age ranges, gender, location, etc.)? Why? Does your market research support this (refer to section 2.4)?

Product

Use Value Proposition section of Business Canvas

What is your product? Describe in detail. What makes your product different from others in the market? Why is it unique? What packaging are you using? Refer to Appendix D.

Price

How much will each product cost? Why do you feel that is a good price? Justify based on specific competitors prices.

Place

Where will you be selling your product/service (ex. Trade shows, corporate trade fairs, schools, door-to-door, etc.)? What are you going to do to ensure best presentation of your product?

Promotion and Advertising

How are you going to promote your products? Slogans? Displays? Word-of-mouth? TV/Radio ads? What type of promotion/advertising would be successful for you and why?

2.4 Budgets/Sales Forecasting

How many units of product/service do you plan on selling per week and in total? How many will each member sell per week? How many at trade fairs?

Include a table for Sale Forecast (how many products will each member sell per week, total for that week in units and dollars). Refer to the Company Program Record Keeping Spreadsheet.

2.5 Market Research

Include all the possible information from your market research that explains why you chose your product. What questions were asked? What conclusions did you make? [Optional: Create graphs and tables indicating the number of people interviewed and their answers. Include a legend and a description of each graph or table.]

3.1 Key Activities

To be completed by various team members

Use the Key Activities section of your Business Canvas to complete this section

3.2 Production

What are your goals/objectives when it comes to producing your product (Ex. Production goal, product quality [what is high quality to you?], efficiency, environmental considerations, etc.)?

Where are you making the product? Who is making the product?

3.3 Materials Procurement

Use key materials/supplies/resources section of your Business Canvas

Where are you buying the materials for your product? Who is responsible for picking them up/buying them?

How are you making your product? What are the steps involved?

3.4 Training

Who is responsible for training your members in the production process? How will they be trained? What date did training happen? What are the safety issues when producing your product? How will you prevent accidents?

3.5 Quality Control

How do you insure that each product is made with the same quality? Describe what a high-quality product looks like.

3.6 Inventory Control

How will you keep track of all: Materials inventory, products not yet completed, products already complete?

3.7 Research & Development

How will you improve your product? Who is responsible for doing that? How will you determine what needs to be improved?

3.8 Human Resources

To be completed by VP HR

What are your goals/objectives when it comes to keeping a well-run team (Ex. Attendance, compensation, retention, social entrepreneurship, etc.)? List up to 5 SMART goals. Each goal must have up to 3 specific actions you will take to ensure the goal is met.

Attach a company photo and organizational chart in Appendix A.

3.9 Information Technology

To be completed by VP IT

What are your goals/objectives when it comes to utilizing technology (Ex. Record keeping, templates, web site, etc.)? List up to 5 SMART goals. Each goal must have up to 3 specific actions you will take to ensure the goal is met.

How are you going to get all information from other areas? How are you going to ensure that data is safe and confidential? What will you do with the paper copy of the record? How will you ensure the information is accurate?

What specific online tools will your company utilize? Website? Email? Social media (working with VP Marketing)?

4.0 Financial Plan

To be completed by the VP Finance

Use information from Fixed and Variable Costs and Revenue from your Business Canvas

4.1 Goals and Objectives

What are your goals/objectives when it comes to your company's finances (Ex. Financial goals, return to shareholders, timely payments, etc.)? List up to 5 SMART goals. Each goal must have up to 3 specific actions you will take to ensure the goal is met.

4.2 Initial Capitalization

How many shares did your company sell (number and dollar value)? How much money do you need to start your company? Why? What are your specific costs of capitalization (initial material purchases, initial promotional materials, etc.) that this money will cover?

5.3 Break-Even Analysis

What are your fixed costs? What are your variable costs? What is your breakeven point in dollars and units? Refer to the Company Program Record Keeping Spreadsheet.

Attach the breakeven spreadsheet and a breakeven analysis graph in Appendix C.

5.4 Financial Statements

Income Statement

Attach your Income Statement Forecast (the Budget from the Company Program Record Keeping Tool) in Appendix C. Ensure that there are NO entries in your financial worksheet at this time so that the “Actual” and “% of Budget achieved” columns are empty.

Balance Sheet (check these instructions after viewing Record Keeping Tool)

Attach FORECAST Balance Sheet in Appendix C (what your Balance Sheet will look like after you meet your sales goal but before you liquidate). You can use the same format as the Balance Sheet in the Company Program Record Keeping Spreadsheet, but you will need to input in values in each area OUTSIDE of the Company Program Record Keeping Spreadsheet.

5.5 Risks

What financial risks are involved in making and selling this type of product? How much money could you lose? What would happen to your shareholders?

Appendices

Appendix A

Team photo with names

Company organizational chart (with names and roles)

OPTIONAL: Executive team photos and bios

Appendix B

Breakeven Analysis page from the IT System (instructions may change based on what teams use)

Breakeven Analysis graph (created byyou)

(These instructions will change based on what system the teams use)

Income Statement Forecast (the Budget from the IT System).

Ensure that there are NO entries in your financial worksheet at this time so that the “Actual” and “% of Budget achieved” columns are empty.

Balance Sheet Forecast (what your Balance Sheet will look like after you meet your sales goal but before you liquidate). You can use the same format as the Balance Sheet in the IT System, but you will need to input in values in each area OUTSIDE of the IT System.

Product photographs (please show products to scale, different colors, variations, etc.)

Appendix D